

POSITION DESCRIPTION

OSER-DMRS-10 (Rev. 08-2013) State of Wisconsin		1. Position No.	2. Cert / Reclass Request No.	3. Agency No. 566
4. NAME OF EMPLOYEE		5. DEPARTMENT, UNIT, WORK ADDRESS Wisconsin Department of Revenue Office of General Counsel Resolution Unit; Office Audit 2135 Rimrock Road Madison, WI 53713		
6. CLASSIFICATION TITLE OF POSITION Tax Resolution Officer-Office Audit Objective				
7. CLASS TITLE OPTION (<i>to be filled out by Personnel Office</i>)		8. NAME AND CLASS OF FORMER INCUMBENT		
9. AGENCY WORKING TITLE OF POSITION Resolution Officer		10. NAME AND CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES		
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Tax Resolution Management Supervisor <i>Resolution Officer (Office Audit) Supervisor</i>		12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?		
13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes <input type="checkbox"/> No X <input checked="" type="checkbox"/> IF YES, COMPLETE AND ATTACH A SUPERVISORY POSITION ANALYSIS FORM (OSER-DCLR-84).				

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

SEE ATTACHED

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %

GOALS AND WORKER ACTIVITIES

(Continue on attached sheets)

SEE ATTACHED

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION

- a. The supervision, direction, and review given to the work of this position is [X] close [] limited [] general.
- b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.

Signature of first-line supervisor _____ Date _____

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.

Signature of employee _____ Date _____

18. Signature of Human Resources Manager _____ Date _____

Tax Resolution Officer-Office Audit Objective

03/17/16

POSITION SUMMARY (Line 14)

The individual in this entry-level position is responsible for acting on petitions for redetermination of assessments, notices of refund and notices of refund denial originating from the Audit and Processing Bureaus. Job duties primarily involve reviewing appeals filed by individuals and corporations relating to income tax, sales/use tax and withholding tax office audit determinations. Work is reviewed by the Resolution Unit supervisor and is performed under close progressing to general supervision.

TIME % GOALS AND WORKER ACTIVITIES (Line 15)

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|-----|---|
| 65% | <p>A. Review and act on petitions for redetermination filed in regard to income tax and sales/use tax assessments, notices of refund and notices of refund claim denial originating from the Central Audit Section. These cases involve issues relating to all types of individual income tax, earned income credit, homestead credit, farmland preservation credit, and sales/use tax office audits.</p> <ul style="list-style-type: none">A1. Relate the facts of the problem area to Wisconsin Statutes, Internal Revenue Code, department rules and policy as well as applicable case law.'Relate the facts of the problem area to Wisconsin Statutes, Internal Revenue Code, department rules and policy as well as applicable case law.A2. Correspond and telephone taxpayers to obtain required information.A3. Schedule and hold informal conferences when necessary.A4. Consult with the appropriate complex appeals team in regard to complex legal matters.A5. Negotiate settlements that are reasonable in light of the facts and circumstances in each case and hazards of litigation.A6. Advise the taxpayer as to decision to sustain or not sustain the assessment and clearly communicate to the taxpayer the reasons for the decision.A7. Prepare amended assessment notices, audit reports, extensions, etc.A8. Prepare action notices or closing agreements.A9. Provide feedback on the resolutions of petitions for redetermination and discuss problem areas with auditors.A10. Advise legal staff in regard to accounting problems of cases pending before the courts.A11. Consult with legal staff regarding cases which are to be resolved before the case goes to trial. Give approval if in agreement with attorney.A12. Testify before the Tax Appeals Commission. |
| 35% | <p>B. Review and act on selected petitions for redetermination filed in regard to income tax, sales/use tax and withholding tax adjustment notices originating from the Processing Bureau.</p> <ul style="list-style-type: none">B1. Relate the facts of the problem area to Wisconsin Statutes, Internal Revenue Code, department rules and policy as well as applicable case law.B2. Correspond and telephone taxpayers to obtain required information.B3. Schedule and hold informal conferences when necessary.B4. Consult with the appropriate complex appeals team in regard to complex legal matters.B5. Negotiate settlements that are reasonable in light of the facts and circumstances in each case and hazards of litigation.B6. Advise the taxpayer as to decision to sustain or not sustain the assessment and clearly communicate to the taxpayer the reasons for the decision.B7. Prepare amended assessment notices, audit reports, extensions, etc.B8. Prepare action notices or closing agreements.B9. Provide feedback on the resolutions of petitions for redetermination and discuss problem areas with Processing personnel.B10. Advise legal staff in regard to accounting problems of cases pending before the courts.B11. Consult with legal staff regarding cases which are to be resolved before the case goes to trial. Give approval if in agreement with attorney. |

Tax Resolution Officer-Office Audit Objective

03/17/16

B12. Testify before the Tax Appeals Commission.

KNOWLEDGES, SKILLS AND ABILITIES

1. Knowledge of state income tax, sales/use tax and withholding tax laws, federal tax laws, department rules, regulations and related accounting and audit practices.
2. Knowledge of office audit procedures relating to individual income tax, sales/use tax and withholding tax.
3. Knowledge and ability to research tax law and skill in applying it in an impartial and reasonable manner.
4. Knowledge of the procedures and role of the Tax Appeals Commission.
5. Knowledge of agency tax forms.
6. Knowledge of WINPAS.